



SANDATA ELECTRONIC VISIT VERIFICATION (EVV) OVERVIEW

OBJECTIVES

- ◆ Access and log in to Sandata EVV
- ◆ Reset passwords
- ◆ Navigate Sandata EVV (with/without Americans Disabilities Act (ADA) support)
- ◆ Define common functions within Sandata EVV

KEY TERMINOLOGY

Term/Acronym	Definition
Americans with Disabilities Act (ADA)	The Americans with Disabilities Act of 1990 is a civil rights law that prohibits discrimination based on disability.
Job Access With Speech (JAWS)	Job Access With Speech is a computer screen reader program for Microsoft Windows that allows blind and visually impaired users to read the screen either with a text-to-speech output or by a refreshable Braille display.

SYSTEM REQUIREMENTS

- ◆ Sandata EVV
 - Is a web-based system accessed using a web browser
 - Supports Internet Explorer (IE), Mozilla Firefox or Google Chrome web browsers
- ◆ Acrobat Reader or another PDF Viewer is required to view reports

ACCOUNT ACCESS

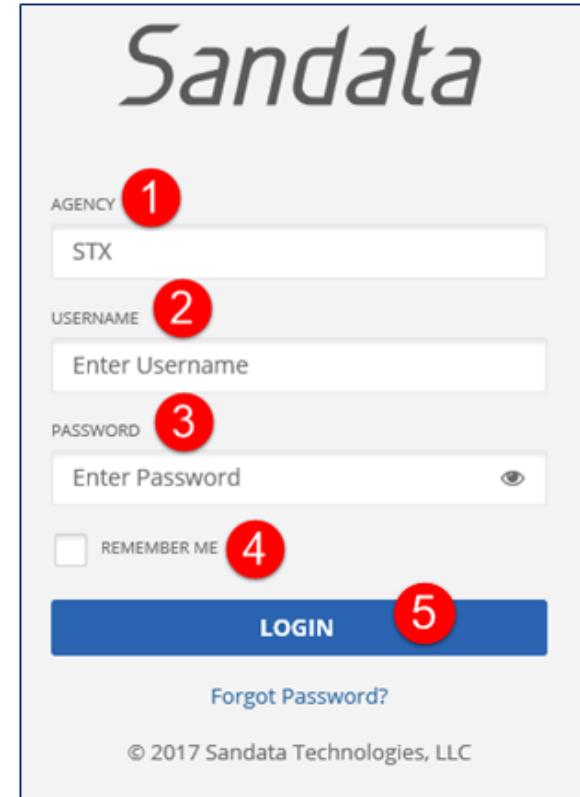
- ◆ After completing the Site Survey and training, you will receive your agency Welcome Kit email containing:
 - Database URL
 - ADMIN login credentials
 - Call Reference Guide
 - Getting Started Guide
- ◆ Agencies need to set up each system user with a unique user name and password.



LOGGING IN

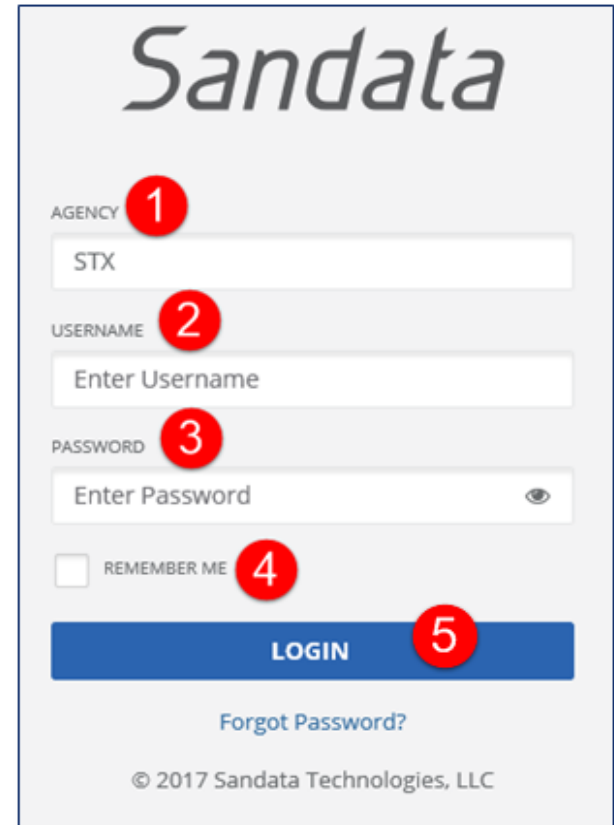
OVERVIEW

- ◆ Follow the steps below to log in to Sandata EVV for the first time:
 - Agency EVV Security Administrator – use the credentials received in the Welcome Kit and click **LOGIN**
 - All other Users – enter the credentials provided by the Agency EVV Security Administrator and click **LOGIN**

A screenshot of the Sandata login interface. At the top is the 'Sandata' logo. Below it are five numbered steps in red circles: 1. 'AGENCY' field with 'STX' entered; 2. 'USERNAME' field with 'Enter Username' placeholder; 3. 'PASSWORD' field with 'Enter Password' placeholder and an eye icon; 4. 'REMEMBER ME' checkbox; 5. 'LOGIN' button. Below the button is a 'Forgot Password?' link and a copyright notice '© 2017 Sandata Technologies, LLC'.

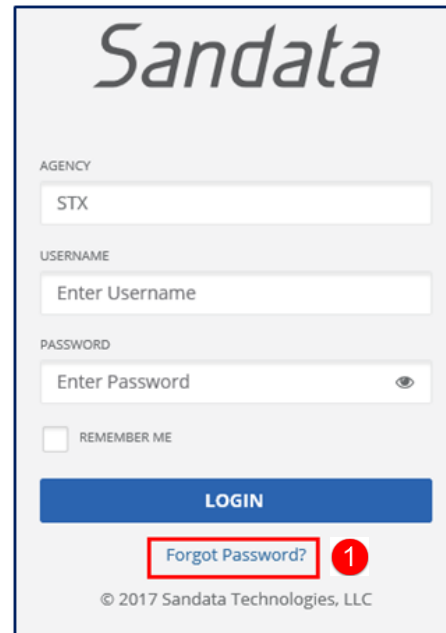
OVERVIEW

1. **AGENCY** – Example: STX#### (#### = account number)
2. **USERNAME** – The username is the email address used when creating a system user (username is not case sensitive).
3. **PASSWORD** – Must be at least 12 characters long, have at least one upper case, one lower case letter, one numeric character and one “special” character (@#\$%^). The password is case sensitive.
4. **REMEMBER ME** – When enabled, this checkbox preserves the last Agency and Username entered.
5. **LOGIN** – gain access to Sandata EVV.

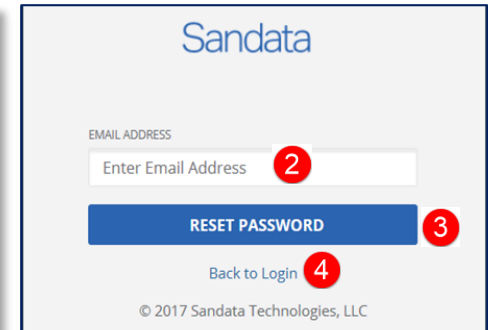
A screenshot of the Sandata login interface. At the top is the 'Sandata' logo. Below it are five numbered red circles (1-5) pointing to specific form elements: 1 points to the 'AGENCY' label, 2 to the 'USERNAME' label, 3 to the 'PASSWORD' label, 4 to the 'REMEMBER ME' checkbox, and 5 to the 'LOGIN' button. The form includes input fields for 'AGENCY' (containing 'STX'), 'USERNAME' (with placeholder 'Enter Username'), and 'PASSWORD' (with placeholder 'Enter Password' and a toggle icon). Below the password field is a 'REMEMBER ME' checkbox. The 'LOGIN' button is a blue rectangle. Below the button is a 'Forgot Password?' link and a copyright notice '© 2017 Sandata Technologies, LLC'.

RESET A FORGOTTEN PASSWORD

1. Click **Forgot Password?**
2. Enter the **EMAIL ADDRESS** (username) used to log in.
3. Click **RESET PASSWORD**.
4. Click **Back to Login**. The Login screen opens.



The login screen features the Sandata logo at the top. Below it are three input fields: 'AGENCY' with 'STX' entered, 'USERNAME' with 'Enter Username' placeholder, and 'PASSWORD' with 'Enter Password' placeholder and an eye icon. A 'REMEMBER ME' checkbox is below the password field. A blue 'LOGIN' button is at the bottom. A red box highlights the 'Forgot Password?' link, with a red circle containing the number '1' next to it. The footer reads '© 2017 Sandata Technologies, LLC'.



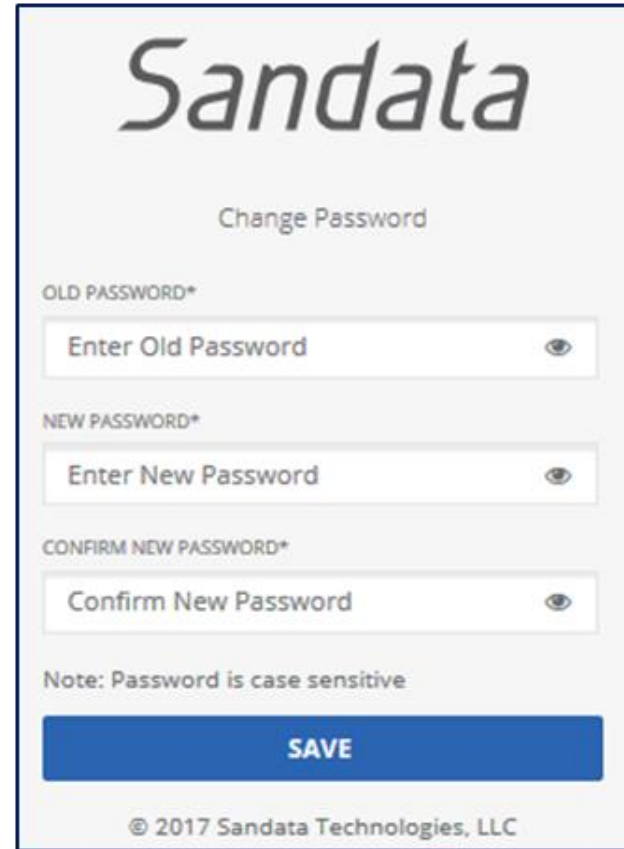
The reset password screen features the Sandata logo at the top. Below it is an 'EMAIL ADDRESS' input field with 'Enter Email Address' placeholder, with a red circle containing the number '2' next to it. A blue 'RESET PASSWORD' button is below the input field, with a red circle containing the number '3' next to it. A 'Back to Login' link is below the button, with a red circle containing the number '4' next to it. The footer reads '© 2017 Sandata Technologies, LLC'.



Passwords are valid for 60 days. A user begins receiving prompts 10 days before the password expiration date to reset the password.

RESET A FORGOTTEN PASSWORD

5. Enter the temporary password in the **OLD PASSWORD*** field.
6. Create and enter a new password in the **NEW PASSWORD*** field.
7. Re-enter the password in the **CONFIRM NEW PASSWORD*** field.
8. Click **SAVE**.

A screenshot of the Sandata 'Change Password' web form. The form has a light gray background and a blue border. At the top is the 'Sandata' logo. Below it is the title 'Change Password'. There are three input fields: 'OLD PASSWORD*' with the placeholder 'Enter Old Password', 'NEW PASSWORD*' with the placeholder 'Enter New Password', and 'CONFIRM NEW PASSWORD*' with the placeholder 'Confirm New Password'. Each field has a small eye icon to its right. Below the fields is a note: 'Note: Password is case sensitive'. At the bottom is a large blue button labeled 'SAVE'. The footer of the form reads '© 2017 Sandata Technologies, LLC'.



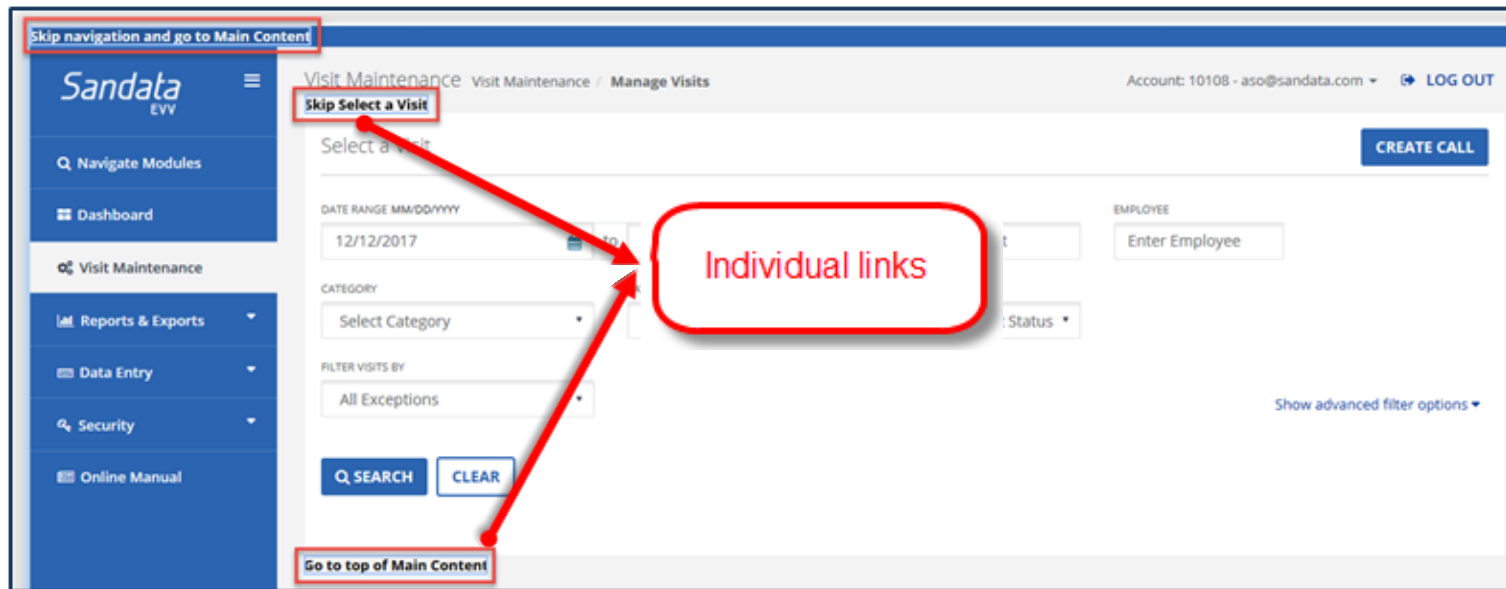
NAVIGATING SANDATA EVV: ADA NAVIGATION SUPPORT

The Visit Maintenance screen displays immediately after log in.

A screenshot of the Sandata EVV 'Visit Maintenance' web application. The interface has a blue sidebar on the left with navigation links: 'Navigate Modules', 'Dashboard', 'Visit Maintenance' (selected), 'Reports & Exports', 'Data Entry', 'Security', and 'Online Manual'. The main content area is titled 'Visit Maintenance / Manage Visits'. At the top right, it shows 'Account: 9631 - user19631', an 'Enter agency' dropdown, and a 'LOG OUT' link. Below the title is a 'Select a Visit' section with a 'CREATE CALL' button. The form includes several input fields: 'DATE RANGE MM/DD/YYYY' with a date picker showing '01/02/2019' to '01/02/2019'; 'CLIENT' with an 'Enter Client' field; 'EMPLOYEE' with an 'Enter Employee' field; 'CATEGORY' with a 'Select Category' dropdown; 'PAYER' with a 'Select Payer' dropdown; 'VISIT STATUS' with a 'Select Visit Status' dropdown; and 'CLIENT MEDICAID ID' with an 'Enter Client Medicaid ID' field. There is also a 'FILTER VISITS BY' dropdown set to 'All Exceptions' and a 'Show advanced filter options' link. At the bottom are 'SEARCH' and 'CLEAR' buttons.

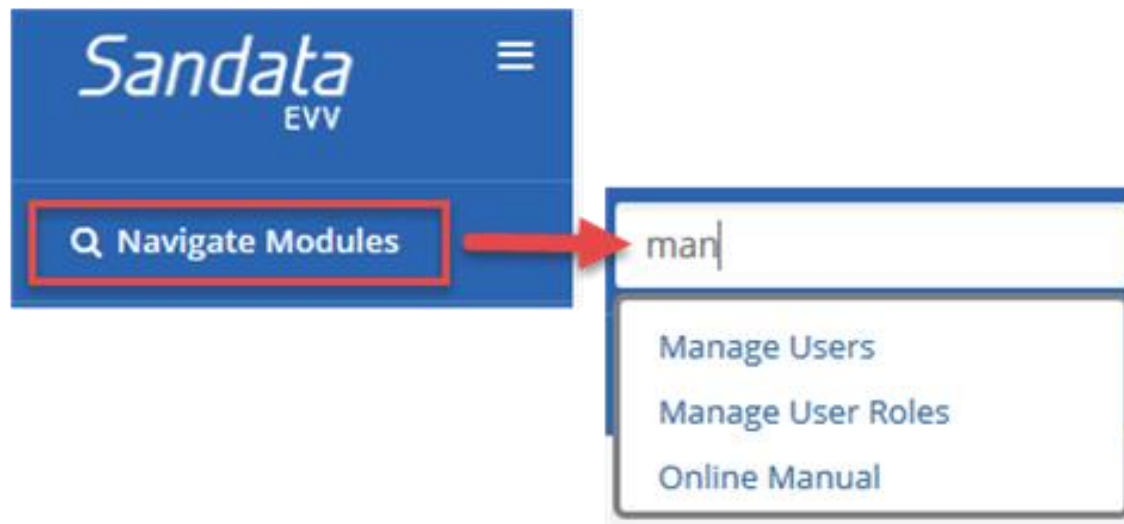
NAVIGATING SANDATA EVV: ADA NAVIGATION SUPPORT

Sandata EVV can be navigated using only the keyboard. It is also Job Access With Speech (JAWS) Reader compliant. Below is the Visit Maintenance screen.



NAVIGATING SANDATA EVV: ADA NAVIGATION SUPPORT

Click **Navigate Modules** on the *Navigation* panel to open the **Navigate Modules** field.



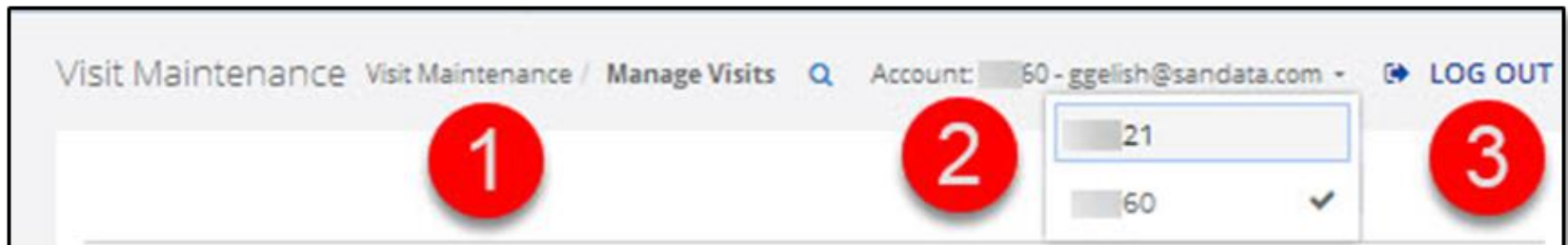
NAVIGATING SANDATA EVV: ADA NAVIGATION SUPPORT

- ◆ When a user remains idle for 15 (fifteen) minutes, the system displays a warning message asking if they require more time.
- ◆ If the user does not respond within 2 minutes, Sandata EVV automatically times out.




NAVIGATING SANDATA EVV: COMMON ELEMENTS

Sandata Header – located at the top of every screen in the Sandata EVV. It displays key information about each screen along with functionality to navigate between modules or to log out of the system.

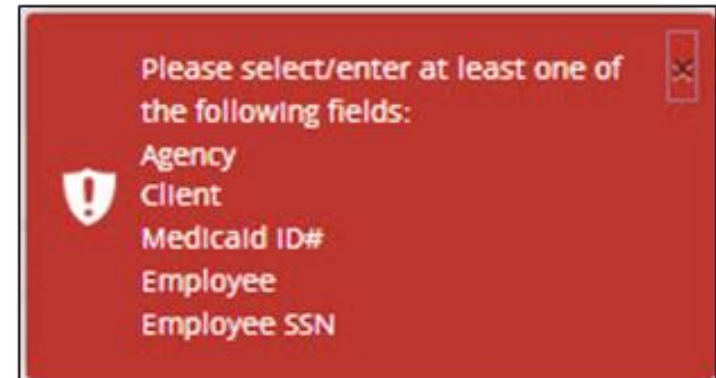
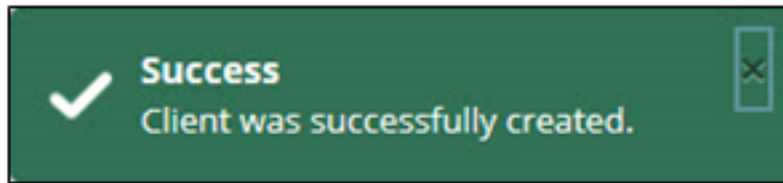


NAVIGATING SANDATA EVV: COMMON ELEMENTS





	Function	Description
1.	Navigation Path	This field shows the exact location in the system and the current screen.
2.	Account and User Display	<p>Displays the account the user is logged into and the username/email of the user currently logged in.</p> <p><u>Moving Between Multiple Accounts</u></p> <p>Click the small arrow icon alongside the user name to display a list of accounts for which the user is authorized to access. Selecting the account number moves the user to that account without having to log out and log in again.</p> <hr/> <div>  <p>A user must have permissions to log into more than one account and the username must be the same across all accounts</p> </div> <hr/> <p>The account the user is currently logged into is indicated by a check mark.</p>
3.	Log Out	Logs the user out of the system and displays the login screen.

NAVIGATING SANDATA EVV: COMMON ELEMENTS

Confirmation and Error Messages – appear at the top center of the screen.



Assignment Buttons – appears whenever a screen has settings that require moving items between Available and Assigned fields.

Button	Function	Description
	Add All	This button moves all items from the Available field to the Assigned field.
	Add Item(s)	This button moves single or multiple items from the Available field to the Assigned field. Click on multiple items to add them together, if necessary.
	Remove Item(s)	This button moves single or multiple items from the Assigned field to the Available field. Click on multiple items to add them together, if necessary.
	Remove All	This button moves all Items from the Assigned field to the Available field.



QUESTIONS...

